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INCREASING SALES OF PERTAMINA NON-PSO FUEL THROUGH NEW CONCEPT OF GAS STATION

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Abstract-Pertamina must increase revenues from the sale of Non- Public Service Obligation (PSO) Fuel. Increased sales of Non-PSO fuel Pertamina can be obtained if Pertamina can give right market offering to the general market segment "BBM Non-PSO and PSO Combiner". Research showed that Pertamina gas station CVP is under CVP competitors so lowering costumer experience and the business ecosystem of Pertamina also have problem. Based on that data, researchers proposed a new concept of gas station that only sell Non-Pso fuel named Pertamina Prime-X Gas Station and have new business ecosystem.

Keyword: Costumer Value Proposition, Business Ecosystem.

1. Introduction

Gas Station is a sector in oil and gas industry in Indonesia. It began with the establishment of regulations on oil and gas in 1971 (*Undang-undang* no.8/1971) which continues with the issuance of *Undang-undang* No.22/2001 which contains adjustment and liberalization of regulators, supervisors and operators of oil and gas industry at the national level due to insistence from the international community so that the oil and gas industry in Indonesia could be healthier and not monopolized by one company namely PT.Pertamina Persero.

Along with increasing of operator in Indonesia, the non PSO-fuel consumers have a wide choice in selecting the non-PSO fuel products according to the needs and benefits that provided by each operator, resulting in the transfer of customers from one operator to other operators. Free hard competition was unavoidable due to the development of this sector of retail outlets. It can be seen from the number of companies that provide these products. In 2011 there are 5 operator operating in Indonesia

Table 1.1 Gas Station Operators in Indonesia

| No. | Gas Station Operator | Ownership | Number of Gas Station |
|-----|----------------------|------------|-----------------------|
| 1 | Pertamina | Indonesia | 1.686 |
| 2. | Shell | Netherland | 55 |
| 3. | Petronas | Malaysia | 18 |
| 4. | Total | France | 5 |
| 5. | AKRA | Indonesia | 16 |

Source: BPH Migas (Proceed)

With increasing the gas station operator, the market that initially monopolized by one operator now automatically divided to the new operators, the market share of non-PSO Fuel is now divided

according to the efforts that made by operators to attract consumers to use their products. Although fuel is a commodity product, but in fact, consumers have the judgment and reasons for buying a fuel product, not merely just looking for products only. Therefore the operator must formulate strategies that consumers choose the products they offer. The formulation of a marketing strategy and business strategy undertaken by each gas station operator must have unique characteristics and will always thrive in an era of fierce competition in the free market.

PSO fuel demand continues to increase every year, make the government plans to make PSO fuel use restrictions. Restrictions are made to reduce the burden of government subsidies. Fuel subsidized restrictions scenario that may be applied by the government that is based on the capacity of the machine as well as the car production year, which is all cars that produced in 2005 and forward with a fuel capacity above 2000cc must use non-PSO fuel. It is planned to be implemented in early 2012. Details about subsidy that burden by the government will shown in exhibit 1. Estimated number of non-PSO fuel market will grow as much as 3.1 million KL/year, as a result of the migration of consumers to be impacted by restrictions on the use of PSO fuel. The increase in the market of non PSO-fuel also increases the opportunities for operators to increase market share and revenue, especially for foreign companies.

Based on interviews with CEO expert staff downstream areas PT. Pertamina Persero (Jugi Prajogio, August 2nd,2011), development and increasing sales of non PSO-fuel products is a plan devised by Pertamina in 2011-2012 to address and take advantage of the growing market of non PSO-fuel due to PSO fuel restriction plan and competition with other gas station operators. Moreover, focusing of non-PSO fuel sales by Pertamina is also based on the rating factors of non-PSO fuel sales per day per Pertamina's gas stations are low than its competitors. Detail about average sales 2010 in exhibit 2.

Table 1.2 Total Sales and Marketing efficiency 2010

| Operat or SPBU | Tota l Sale s 201 0 (in Milli on KL) | Mar ket shar e | Nu mb er Of Gas Stat ion | Outl et Shar e | Mark eting effici ency |
|----------------------|--|-------------------------|--|-------------------------|---------------------------------|
| Shell | 0.30 | 19.2 % | 55 | 3.1 % | 6.15 % |
| Total | 0.01 | 0.6 % | 5 | 0.3 % | 2.03 % |
| Petron as | 0.03 | 1.7 % | 18 | 1.0 % | 1.63 % |
| Pertam ina | 1.23 | 78.6 % | 168 6 | 95.6 % | 0.82 % |
| AKRA | 0.01 | 0.6 % | 16 | 0.9 % | 0.71 % |

Source: BPH Migas (Proceed)

In total, Pertamina sales and market share still far above the competitors, it is because Pertamina has a number of gas stations with more extensive distribution which is almost cover all of Indonesia, but when compared with marketing efficiency ratio (% market share /% outlet share), Pertamina was in fourth with 0.82%, followed by Petronas with 1.63%, Total 2,03% and the highest ratio was Shell with 6.15%, and in the last position held by the AKRA which is the new players, as shown in the following table:

Another reason Pertamina to develop and improve non PSO-fuel sales is non-PSO fuel market will be huge and promising beginning in 2012 that result from the development of engine technologies that car requires non PSO-fuel. Growth and the addition of these markets will be contested by the gas station operators to increase selling. It could be an opportunity for Pertamina to attract new customers and increasing sales of non-PSO fuel.

Based on field observations conducted at gas station, Non-PSO fuel market can be divided into two parts, the general consumer and specific consumer. General consumer is the consumer who has the freedom to buy the any type of fuel and gas station operator. Non-PSO fuel General Consumer can be grouped into 3 groups, namely:

- Quality BBM Non-PSO seeker
Consumers that prioritize the quality of the PSO fuel of a particular brand, and always buy fuel at the gas station according to their particular quality.
- Quality BBM Non-PSO and convenience
Consumers that prioritized the quality and convenience in getting the products. Consumers do not really care about brands of fuel as long the fuel is Non-PSO fuel and qualified and easy to get, they will find nearest gas station and did not see who the gas station operator is.
- Non-PSO and PSO Combiner
Consumers who sometimes fill the fuel is mixed non-PSO with PSO fuel, have a desire to buy fuel for non-PSO because of the awareness of the benefit gained, but consumers are still hesitant to spend more money to buy fuel completely non-PSO due to not look at other benefits to buy Non-PSO fuel beside the good quality of the products.

General market will continue to growth. Consumer "Non-PSO and PSO Combiner" will continue to increase along with the increase in vehicle population, its growth is influenced by a number of scenarios, including the increasingly purchase power of the people, the public awareness of the benefits of using non-PSO fuel and the enhancement of economical car population. "Non-PSO and PSO combiner" consumers are expected to increase along with an increasing in gas station public services. Specific consumers are directed-types consumer and be supposed to purchase non PSO-fuel type at Pertamina gas stations by the government of the Republic of Indonesia. These consumers are the servants of the State which use government vehicle, military, police, civil servants and other State-owned service vehicles. Growth of the market is not very high and likely to remain and periodic.

The effect of the dimensions of non-PSO fuel market makes competitors more intensive to expand the distribution network of gas stations in Indonesia and will increasingly threatened the sales of non PSO-fuel products of Pertamina. If Pertamina was not able to capitalize on the increasing opportunities of non-PSO fuel market by enhancing and realize sales targets predetermined, it is predicted Opportunity lost from 2011 that may be experienced by Pertamina result of increasingly aggressive competitors to expand its distribution network and increasing sales targets amounted to 1.61 Million KL / year. Shell is targeting total sales as much as 1095 million KL, followed by Total 0,146 million , and Petronas 0.109 Million KL, AKRA 0.260 Million KL, and Pertamina 5.67 Million KL. Details about target sales will shown in exhibit 3.

Pertamina should be more active to attract the general market and not just only satisfied with the provision of specific markets by the government, because the real consumer is in general market and in this current time, general consumers of Pertamina estimated switch to use another operator's product. The reason is reinforced by the statement of Dr.Kurtubi (oil analyst). He said that many of Pertamina's consumer currently are turning to use of non-PSO Petrol filling stations owned by foreigners because of the vigorous expand competitors and offer attractive promotions that affects sales of Pertamina's non PSO-fuel. As a conclusion, business issue that occurs in Pertamina is how the general consumer interest for the use of petroleum products Non-PSO-owned Pertamina, so gas

station sales per day of non-PSO fuel can be improved and can compete with its competitors. Details about conceptual business issue will shown in exhibit 4.

2. Business Issue Exploration

The business issue is How Pertamina attracts general consumer interest (especially non-PSO and PSO Combiner) to use their non PSO-fuel products, so the sales of non PSO-fuel per gas station per day can increase and can compete with their competitors. The business issue will be discussed in depth to identify root causes of problems occurred. From interviews with expert staff CEO PT.Pertamina downstream fuel retail sector, Mr. Jugi Prajogio , these are the causes of the problem:

- Pertamina's customer value proposition (CVP) is low compare with competitor.
- PSO Fuel consumer queues merging with non-PSO Fuel consumer in Pertamina gas station.
- Pertmaina business ecosystem may not running well

A. Conceptual Framework

To understand the causes of Non PSO -fuel sales Pertamina is low than competitors, this study used a conceptual framework below:

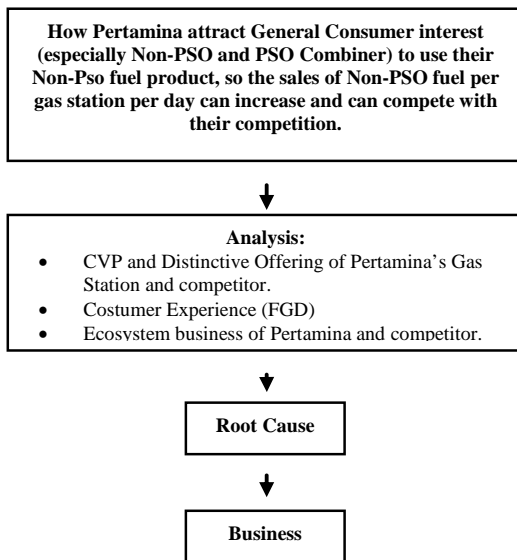


Figure 1. Conceptual Framework

B. Method of Data Collection and Analysis

Data collection will be done through interviews with expert staff CEO PT.Pertamina downstream fuel retail sector, Mr. Jugi Prajogio. The data used come from the presentation Mr. Jugi Prajogio to CEO, entitled "Revitalization of Business Plan of Non-PSO Fuel (Retail) in anticipation the restriction of PSO fuel and Competitors". Interviews were conducted to determine data regarding the development of the gas station business situation, business ecosystem and CVP desired by consumers and Pertamina gas station conditions and competitors. In addition, data was also obtained from the Focus Group Discussion (FGD). FGDs were conducted to the costumer group of "Fuel Non-PSO and PSO Combiner". FGDs were conducted in Bandung with costumer citizens of Bandung that working in Jakarta and have a vehicle. FGDs were conducted to obtain data on the consumer experience to the gas station and get an overview of gas station desired by consumers. purpose of the analysis was to determine and compare the Pertamina CVP with competitors CVP so it can find the desired and expected consumers CVP and assess the performance of the business ecosystem pertamina

C. Analysis of Business Situation

The analysis begins with an exploration of CVP Pertamina and competitor. In terms of the product quality four operators offering similar products, all products come with the cleaning agent and provide long-term benefit. Product quality can be related with one of the characteristics consumers in Indonesia, which tend to have a short memory. They are more focused on the short-term benefit. There is a mismatch between the wants of consumers that prefer short-term benefits with Pertamina offers that more long-term benefit. Vehicle acceleration increased is more preferable But in terms of octane rating, Shell products are superior because Shell has a higher octane rating than the information shown. Shell always add +1 octane rating that shown in the product information, such as Shell Super octane rating shown is 92, but in reality contained octane 93, it affecting consumer vehicle acceleration will be more responsive when compared to products of Pertamina, Total and Petronas. With price that is relatively the same. Shell consumers will get fuel with a higher octane rating than the competitor and get a directly felt benefit.

In terms of the promotional programs, Shell more superior because promotional programs that implemented can be felt directly by the consumers although the prize is not big enough such as direct gifts instead lucky draw. Pertamina and Total are relying on promotional programs such as lucky draw with the prizes which are more expensive than Shell. Promotional direct gifts are more effective to attract customers; it is proven by increase in sales of non-PSO Pertamina fuel in June 2012 when promotional gift directly held.

In terms of the availability, Pertamina gas station is superior compared to competitors which most of Pertamina gas station spread throughout the UPMS III region, while competitors only in the Jabodetabek area, Bandung, Medan and Surabaya. With the large network of Pertamina gas station, the consumers of Pertamina do not need to bother looking for a gas station, but for consumers Pertamina, services for non-PSO fuel a little disturbed because they have to wait in same line with PSO fuel customers which have bigger amount.

Terms of service Shell and Total are more superior because the services provided not only to consumers, but to the consumer vehicle also. To the consumer, the operator Shell and Total will give friendly operator and direct the vehicle to the pump that available and provides stop sign in front of the consumer vehicle and provide a brief explanation of fuel that match for vehicles that is not found in other gas station. While for Total the vehicle service more superior because it provides underbonet service in the form of checks wiper water and oil level. Pertamina gas station are good with the "Pasti Pas" which ensures the quality of customer service, but when analyzed further "Pasti Pas" cannot be used as distinctive offering by Pertamina gas station because it has become a standard in services and other gas station Operators were doing the same thing like that. To improve service to the consumer non-PSO fuel it is felt difficult when the PSO fuel consumers still one queue with Non-PSO Fuel Consumer, which the service time will be shorten for non-PSO fuel because the queue of PSO fuel consumer. "Pasti Pas" insufficient to accommodate the wishes of Non-PSO fuel Consumer which is a consumer with the middle to upper economy class. Middle to upper level consumers desire more specific and more want to be served, in accordance with the amount of money they had spent. There is a mismatch between the desires of consumers with the services provided by Pertamina.

In terms of facilities, Pertamina is good enough with the free supply water to the radiator and fill the wind for tire, but with the self-service method without any special operator would be difficult for consumers because it will make their hands dirty and tend to be bother, whereas the proper air pressure related to vehicle performance. It can be further processed by Pertamina gas station. While other facilities at Pertamina gas station already enough even though it is the same with the other gas station operator facilities.

Based on the descriptions of CVP above, Pertamina gas station do not have distinctive offering and unique selling point to attract consumers to use their Non-PSO fuel product, the service was not too prominent, and the benefits which given are long-term and cannot be perceived by the consumer immediately. Shell is the strongest competitor is superior to almost all of the components except for the availability of the product. The components that need to be fixed by Pertamina after benchmarking with the competitors are component of the services and facilities for motor vehicles and Another factor that inhibits Pertamina is consumer queue of Non-PSO fuel united with PSO fuel consumer, so to give an extra service for the vehicle a little disturbed because it can lead to quite a long queue.

Based on consumer experience, Consumers are not full using non-PSO fuel because the price is too high when compared with the benefit gained. Consumers are willing to use non-PSO fuel without being mixed when get more benefit besides the quality of fuel products, such as better services, promotional programs more attractive, and can increase prestige.

Business ecosystem is an economic community supported by organizations and individuals (Actor) that interact, they are organisms (living things) in the world of business. The idea is every business actor in the "ecosystem" influence and influenced each others, creating a growing relationship in which each business must be flexible and adaptable to survive, as in a biological ecosystem (Moore,1993). Pertamina gas station has not been able to create a good business ecosystem because Pertamina gas station has not been able to create a shared imagination. Seen from the determination of the strategies among actor are still running on their own. One was at retail stores, where gas station only provide place with rent pattern to retail stores, so that retail stores do not have the same goals with the gas station. Relationships between ecosystem that must be fixed at gas stations Pertamina is the relationship between gas station, consumer, and retail stores. Where consumers do not feel they have a good mutual relations of gas station due to suspicions regarding the dose and did not get better service than PSO fuel consumers whereas Non-PSO consumers pay more expensive. The relationship between the consumer, retail stores and gas station must be fixed to create interrelated relationships between the three actors. Ecosystems that form in the Pertamina gas station not yet a competitive advantage for Pertamina because Pertamina gas station do not have a loyal customer unless the customer from the government official vehicles user, do not yet have a strong differentiation, especially when compared to Shell and revenue from sales has not increased significantly.

3. Business Solution

Solution for main problem is Pertamina should try to make new concept of Pertamina's gas station that separate Non-PSO consumer with PSO consumer and The Gas station should be different from current gas station. It is caused by the separation of non-PSO consumer with PSO consumer if they were in the same gas station, the service and facility would not be effective because it can provoke another issue such as the jealousy of PSO customer, and the old gas station will difficult to increase the non PSO consumer prestige because it is located at the same place with PSO fuel. The new concept of gas station can be more accommodated to create harmonic relationship between the actors that exist in gas station business ecosystem. New concept of Pertamina's Gas station is middle-up class premium gas station that only sell non PSO-fuel products with one stop service concept which not just only sell the fuel but also sell daily needs that serve by middle up class branded retail store. The gas station will provide with drive thru concept. The facility and service be adapted special for non-PSO customer. The new name for Pertamina gas station is "Pertamina Prime-X Outlet"



Figure 2. The Logo of Pertamina Prime-X outlet

This new gas station will have a new CVP, on aspects of the product, Pertamina Prime-X will be equipped with the product "Pertamax Racing" that sold through dispenser, and other non fuel retail premium product of Pertamina. Gas station also will added with top brand retail store such as Starbucks, KFC, Ace Hardware, Gramedia, Bright and etc. services and facilities also will be updated. Service will improved with new operator such as "P-Man" This operator must be boy, called "P-Man (Prime Man)", to give gimmick for consumers. "P-Man" will be equipped with special clothes, safari clothing that is red and white color combination and a sign that contain "Wink Your Light once for Pertamax, Twice for Pertamax Plus, Three times for Pertamina Dex and Four times for Pertamax Racing. After "P-Man" see the code provide by the consumer, the operator will guide consumers to the filling area for the product that will be purchased by consumer. During filing process the filling operator will give a catalog of product that exist in gas station, P-man will give service for the vehicle such check and add water to the radiator, clean the windshield and rearview consumer vehicles, checking tire pressure and provides an additional air if the pressure is less and provide tire polishing. Checking tire pressure is important because the fuel efficiency, acceleration and performance of the vehicle more or less influenced by the pressure of the tire. Operator in filling area will be only woman and will give the stop sign in front of costumer's vehicle. The Operator will be given new uniform.



Figure 3. The New Uniform

The physical aspects of buildings also have renewal. The goals are to strengthen the new image to be formed by Prime-X Pertamina's gas stations. The Gas stations that will be used as a prototype is 31.122.04 COCO gas stations which located on Jl. Sultan Iskandar Muda Rt.011/09 Kel. Kebayoran Lama Selatan Kec. Kebayoran Lama Pondok Indah Jakarta. COCO gas stations were chosen because the gas station was managed by PT.Pertamina Retail, by working together with its subsidiary, Pertamina is easier to coordinate strategy. To make the business ecosystem of Pertamina gas stations more solid, the number of actors at the gas stations will be reduced, the existing retail store at the gas stations will be managed by PT.Pertamina retail.



Figure 4. The New Pertamina Prime-X Gas Station

Gas Station will equipped with Toilet with no charge, a clean and dry for both men and women equipped with sink and closet flush that used by sensor system, tissue are always available and in immaculate condition. Mosque with full carpet and equipped with air conditioning to keep the coolness and comfort of customers while performing daily prayers. Promotional program which will be given at the Pertamina-X Prime Outlets are direct gift and discount. Business solutions that offered through Prime-X Pertamina's gas station retail outlets is expected to give a new image to the consumer about Pertamina gas stations that sell Non-PSO fuel products. A new concept of Pertamina's gas stations that include the renewal of physical aspects and services is expected to improve services and facilities that serve to consumers, so the Customer value proposition can be improved. Moreover, the renewals of ecosystems businesses are expected to maintain Prime-X Pertamina gas station's CVP remain high.

4. Conclusion and Implementation Plan

Pertamina gas station Prime-X will be launched to the general public on December 10, 2013 which is the 56 anniversary of the PT. Pertamina, the selection date is based on Prime-X Pertamina gas station project is a prototype project that will be able to influence the direction of policy in the business Non-PSO fuel PT.Pertamina. Time schedule will be divided into 5 phases. Details time schedule will shown in exhibit 5. Pertamina Prime-X gas station renovation estimated spent Rp.3.250.000.000, cost will be obtained 30% from PT.Pertamina Retail as operator and 70% from PT.Pertamina as the owner. Details of funds needed is Rp. 1.000.000.000 for the cost of five exclusive cooperation retail company will be opened at Pertamina Prime-X gas station, the "Ace Hardware", "Grameia", "KFC", "Starbuck" and "Shop and drive". While Rp.2.000.000.000 for the cost of construction and renovation, while Rp.250.000.000 for promotional costs. For tender fee will be paid from PT.Pertamina retail as operator appointed by PT.Pertamina, Budget for tender fee amounting Rp.5.000.000.

Pertamina Prime-X gas station project will be directly under the supervision of the Fuel Retail Unit PT.Pertamina, and conducted by PT.Pertamina Retail. PT.Pertamina retail units involved in this project will be divided into several groups, there are: Non-Fuel Retail and Bright Unit, Engineering Units, Operation Unit. These units report work progress to the director of operations PT.Pertamina Retail, operations director PT.Pertamina Retail PT. consult with Pertamina that represented by Fuel Retail Unit.

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Exhibit 1 Quotas and subsidies burden the government

| | 2010 | 2011 | 2011 (Proposed BP Migas) |
|----------------------------------|-------------------|-------------------|-----------------------------|
| Subsidized fuel demand | 38.59 Million KL | 40,4 Million KL | 40,4 Million KL |
| Government quota | 36.5 Million KL | 38.59 Million KL | 40,4 Million KL |
| Government subsidy burden | Rp.88,89 Trillion | Rp.94.15 Trillion | Rp. 98.57 Trillion |

Exhibit 2 average sales 2010

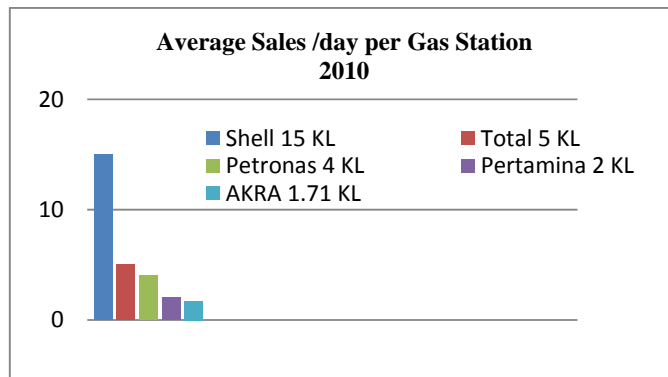


Exhibit 3 Average sales 2011

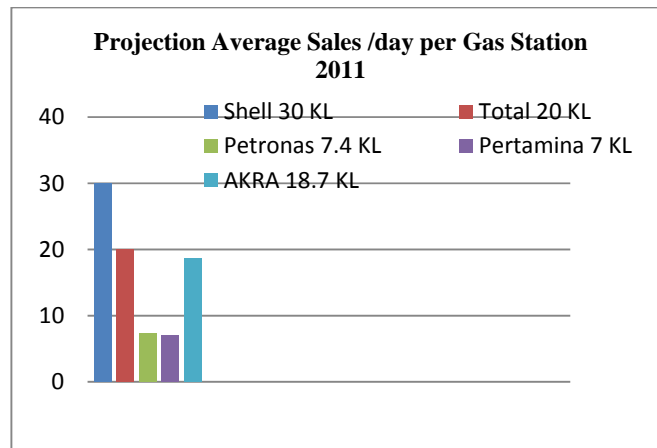


Exhibit 3 Business Issue Frameworks

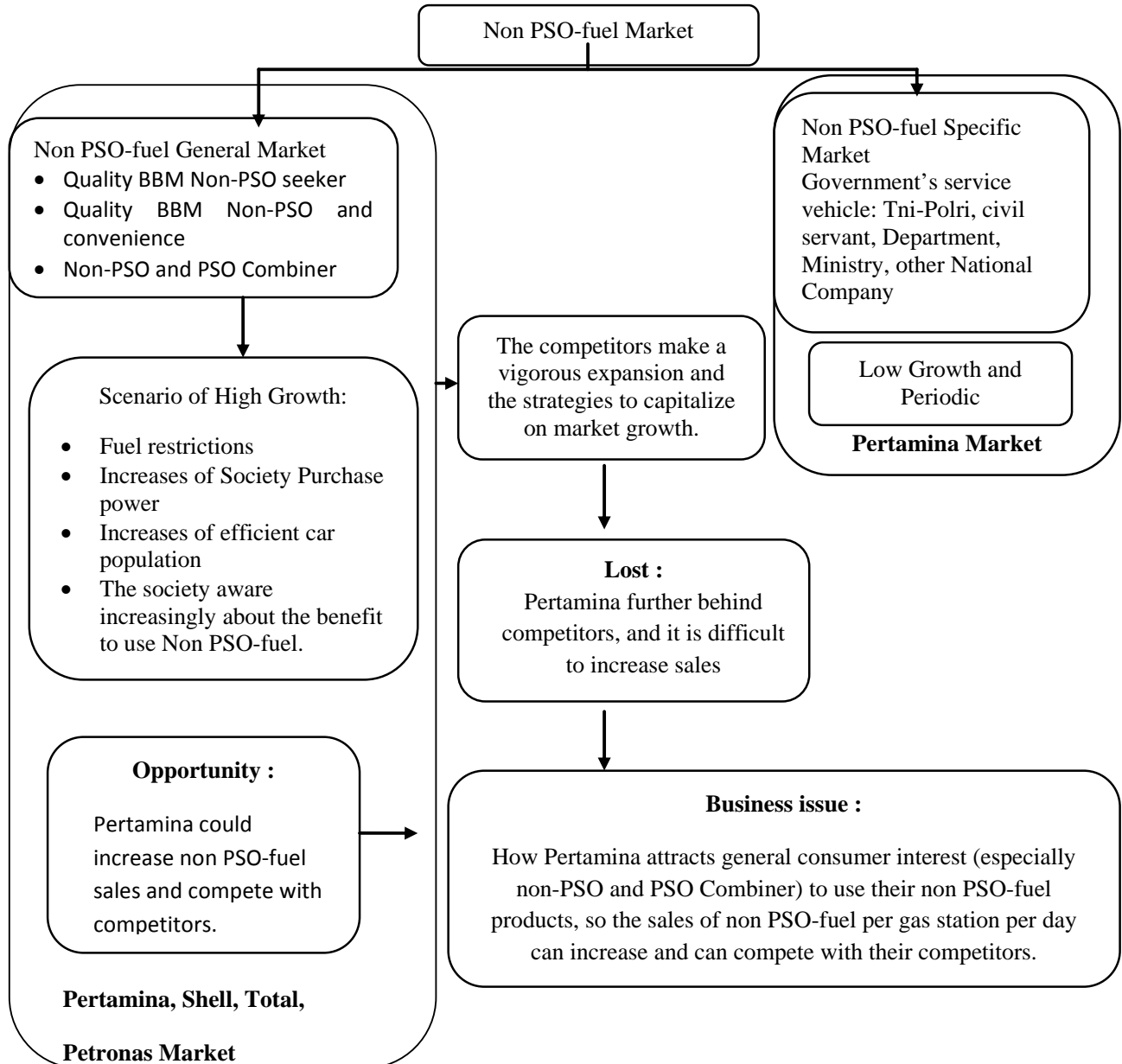


Exhibit 4 Time Schedule

| Phase | Activity | April | | May | | | | June | | | | July | | | | August | | | | September | | | | October | | | | November | | | | December | | | |
|---------|---|-------|---|-----|---|---|---|------|---|---|---|------|---|---|---|--------|---|---|---|-----------|---|---|---|---------|---|---|---|----------|---|---|---|----------|--|--|--|
| | | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | 1 | 2 | 3 | 4 | | | | |
| Phase 1 | Maturation the concept of SPBU Pertamina Prime-X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Maturation of design concept | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Phase 2 | Assessment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Further approaches | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Dealing | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | The signing of a memorandum of cooperation | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Phase 3 | Further existing study and survey | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Discharging ancillary buildings | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Renovation of support building | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | The execution the work supporting structure of filling area | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Canopy release | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | mounting Canopies | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Updates pump area facilities | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Installation support facilities | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Tender process | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Phase 4 | Evaluation of the operator | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Opening job opportunity | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Selection | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Traning | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Phase 5 | Soft Opening | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | Grand Opening | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |